



Author Functionality Checklist

The checklist is current for Version 12.0.

If you have a requirement that you do not see on the list
or if you have questions, please send an email to marketing@edmgr.com

HTTP or secure HTTPS-based system with encrypted passwords.	✓	
Security rules for log-in and user record editing based on publisher policy.	✓	
Online author help screens.	✓	
Authors can register themselves on the system or can be pre-registered by the editorial office.	✓	
Authors can enter personal identifiers such as ORCID, ISNI, PubMed Author ID, Researcher ID, and Scopus Author ID (as permitted by journal).	✓	
Authors and co-authors can be prompted to register for a new ORCID (using the ORCID API).	✓	
Authors can use their ORCID username and password as a Single Sign On (SSO) option between different journals.	✓	
System supports secondary fields for author information so that international authors can enter alternative names or translated addresses.	✓	
Author registrations are checked for duplicates.	✓	
Authors can select their own username and password.	✓	
Authors see registration instructions that have been customized by the editorial office.	✓	
Authors can specify alternate email address and contact information.	✓	
Authors can provide multiple email addresses to ensure receipt of system and journal emails.	✓	
Authors can indicate unavailability dates.	✓	
Authors see their submissions displayed in a modern, streamlined customizable grid.	✓	
Authors and Co-Authors can identify their institutional affiliation from a standardized list of institutional names (Ringgold). Institutional names auto-complete as the Author types.	✓	
Authors can submit their own funder information, as well as co-author funder information using FundRef with sub-agencies.	✓	
Authors can submit a new manuscript.	✓	
Authors see different (customizable) submission instructions for a revised submission than for an original submission.	✓	
Authors can respond to submission questions configured by the editorial office, which can be made mandatory.	✓	
Author submission question/answer formats can include radio buttons, drop-down lists, dates, free text, check boxes, etc.	✓	
Authors and co-authors can be directed to publication-customized web forms to complete multi-part journal questions (e.g. ICMJE form).	✓	
Editorial office can specify that submission steps are mandatory or optional, and limit number of choices or characters allowed for responses.	✓	
Editorial office can configure the inclusion/exclusion of submission steps based on article type.	✓	
Editorial office can specify that some submission items (e.g. revision cover letter) are only required for a revised submission.	✓	
Editorial office can configure the manuscript upload page to allow different submission items for each article type (e.g. Manuscript, Images, Tables, Rebuttal letter, etc.).	✓	
Editorial office can specify which submission items are required for submission.	✓	
Editorial office can require authors to read "user terms and conditions" and choose whether or not to opt-in for special offers.	✓	
Authors can easily insert special characters (unicode-compliant) from a pop-up window, including superscript and subscript numbers.	✓	
Authors can select article type (e.g. Original Study, Book Review, etc.) from a publication-defined list.	✓	

Authors can add co-authors with their academic affiliations, contributor identifiers (such as ORCIDs) and contact email addresses.	✓	
Authors can re-sequence list of co-authors.	✓	
Submitting author can designate a co-author to be the "Corresponding Author."	✓	
"First Author" and "Corresponding Author" can be designated separately.	✓	
Authors can select their own keywords that describe the submission.	✓	
Authors can select their own keywords that describe their area of expertise.	✓	
Authors can easily select from a publication-defined list of keywords displayed in a multi-level hierarchy configured by the publication.	✓	
Authors can suggest or oppose reviewers during manuscript submission.	✓	
Authors can enter comments or a cover letter.	✓	
Editorial office can configure the interface to allow the author to select a particular editor or journal section.	✓	
Authors can upload a wide variety of file formats for conversion into a PDF file (Word, WordPerfect, Text, RTF, TeX, EPS, LaTeX, PDF, GIF, JPEG, TIFF, PowerPoint, Excel, OpenOffice, etc.).	✓	
Authors can upload one or multiple files using drag-and-drop.	✓	
Authors can upload supplementary materials (e.g. audio and video files), and files that are associated with the submission but not part of the manuscript.	✓	
Authors can upload URL/URLs to point to supplementary materials on other systems (such as Figshare or Dryad).	✓	
Author's uploaded files can be automatically sequenced according to publication-defined preference.	✓	
Authors can upload single or multiple files in a single compressed (ZIP) format.	✓	
Authors can conveniently categorize multiple uploaded files (e.g. images).	✓	
Authors have a clear and easy way to submit a revised manuscript without having to resubmit all metadata and files.	✓	
Authors add their own text label (e.g. Fig #) to each submitted item.	✓	
Authors can indicate that an item will be submitted offline.	✓	
Authors can enter metadata into fields such as Figure Number and Figure Legend when uploading a figure file (configured by the journal based on article type).	✓	
Authors can re-sequence the items that are built into a single submission PDF.	✓	
Author-entered submission metadata (e.g. Abstract, Title, Short Title, etc.) can be limited by number of characters or words.	✓	
Authors can enter secondary manuscript information such as translated versions of submission titles.	✓	
If an author is interrupted, the system automatically saves the partially completed submission for later completion.	✓	
All author submission items are virus-checked.	✓	
Author sees interactive feedback about submitted files.	✓	
PDF version of submission includes links back to the original high-resolution items submitted by the author.	✓	
PDF includes "header" information so that it can be identified from web site after downloading.	✓	
Authors can edit the manuscript prior to submission to the editorial office.	✓	
The PDF manuscript generated from the author's submission file preserves HTML links.	✓	
Authors are required to check PDF before final submission to the editorial office.	✓	
Authors receive an (publication-configured) email indicating the availability of the PDF.	✓	
Authors receive an email when the submission has been received by the editorial office.	✓	
Authors can check on the status of a submission at any time.	✓	
The status term seen by the author is configured by the journal according to what the editorial office wants the author to see.	✓	
Authors may be invited to submit papers or commentaries on previously submitted papers.	✓	
Authors of "invited" and "revised" manuscripts are warned of potential duplication if they try to upload a new manuscript rather than proceed with those pending.	✓	
Authors can respond to "invited" manuscripts by clicking on deep links in invitation emails without having to log into the system.	✓	
Submission can be "bounced" back to author for re-submission following inspection and/or editing by the editorial office.	✓	
Emails to authors can include electronic calendar entries (using the iCalendar file format standard) so that author due dates can be easily tracked in their electronic calendar.	✓	

Authors can respond to reviewers' comments. Those responses are recorded in the system.	✓	
(For journals using Open Peer Review workflows), Authors can see Reviewer identifying information.	✓	
Authors can be given access to the similarity check (CrossCheck) results for their manuscript.	✓	
Authors can see individual reviewer responses to reviewer form questions, if permitted by journal.	✓	
If permitted by the Editorial Office, authors can view files attached by reviewers and editors.	✓	
Revised manuscript number includes a revision suffix (R1, R2, etc.) to indicate the revision number.	✓	
Authors can receive automated reminders about revision due dates.	✓	
Authors have access to prior revisions of the submission.	✓	
Authors receive (publication-configured) editor decision letter by email.	✓	
Authors' image files can be processed through automated quality checking to validate against publication defined requirements for image publication.	✓	
Authors' manuscript and images can be optionally overlaid with line numbers.	✓	
Authors' submitted bibliographies can be automatically linked to PubMed and CrossRef, and formatted to the publication's preferred style.	✓	
The system automatically detects and corrects some errors in author-submitted bibliographies. (For example: insufficient authors listed before "et al" or missing volume numbers).	✓	
Authors can be granted access to search a variety of third-party bibliographic databases (such as PubMed, Google Scholar, etc.). Search queries can be configured to automatically use title, keywords or author names as the search criteria.	✓	
Authors have access to send ad hoc emails (which are recorded in the system) to editorial staff. Editorial offices can configure an unlimited number of ad hoc emails that include merge fields to automatically display data such as the manuscript number and title.	✓	
Authors can automatically upload a group of submission files from the arXiv preprint server.	✓	
Author manuscripts can be processed using CrossCheck to identify potential plagiarism. (Additional charges apply).	✓	
Author can submit a letter-to-the-editor and view the editor's response to their letter and other related letters.	✓	
Author submission can be transferred between co-operating Editorial Manager publications and non-Editorial Manager publications.	✓	
In the case of manuscript transfer, Authors can agree/decline the transfer invitation and select the target journal (based on publisher policy).	✓	
Authors have access to manuscript correspondence history from their home page (subject to Editor configuration).	✓	
Authors can agree and process article publication charges (APCs) during manuscript workflow using external processors such as CCC's RightsLink®.	✓	
APC processing supports variable pricing based on manuscript parameters (such as Author country, Author institution etc.) and waiver requests, memberships, discounts, etc.	✓	
Authors can view publication-posted message on their home page.	✓	
Other authors on a submission may be asked to verify that they contributed to the paper.	✓	
Other authors identified on a paper may be asked to register, allowing them visibility into the status of the paper as it goes through the process.	✓	
Co-authors may be asked to complete an author questionnaire as part of their verification process.	✓	
Authors are alerted to time zone differences.	✓	
Authors can click a "Manuscript Services" icon to be conveniently linked to manuscript editing and preparation services.	✓	



Editor Functionality Checklist

The checklist is current for Version 12.0.

If you have a requirement that you do not see on the list
or if you have questions, please send an email to marketing@edmgr.com

The functionality and content available to editors is configured and controlled by the editorial office using web-based administration tools.	✓	
Editor role names and functional capabilities can be configured by the editorial office.	✓	
Editors can view and manage contributor identifiers such as ORCID, ISNI, Researcher ID, PubMed Author ID and Scopus ID. Editors can "fetch" ORCIDs.	✓	
Appropriately authorized editors can delete spurious/test submissions prior to assignment and no charge is made for deleted submissions.	✓	
Peer-review tasks are sent to editors by immediate assignment or by invitation.	✓	
Editors can select a group of candidate Section Editors based on keyword matching and can automatically invite them to handle the submission according to configured schedule and preference.	✓	
Editors are notified of assignments by email and by configurable menu folder options.	✓	
Editors can view their tasks ("action links") in a list or in a pop-up window.	✓	
Editors can have access to additional manuscript data fields customized by the editorial office.	✓	
Editors can have access to additional user data fields customized by the editorial office.	✓	
Manuscript PDFs generated by the system and viewed by editors can include HTML display and linked in journal-configured text.	✓	
Editors can view secondary fields used to store international author name and address variations. Selected secondary fields are searchable.	✓	
Different workflow parameters can be configured based on article type.	✓	
Editors see "search submissions – results" in a modern, streamlined, interactive grid.	✓	
Editors can search for candidate reviewers by creating custom searches that combine name, address, institution, classifications, manuscript keywords, or other criteria including available dates.	✓	
Editors can search and invite reviewers from the Reviewer Discovery database that includes more than 3.5 million candidate reviewers, including comprehensive biographical profile and publication history.	✓	
Editors can view manuscript data fields including secondary submission fields used (for example) to store translated versions of submission titles.	✓	
Editors can assign Reviewers (without an invitation step) to new and revised manuscripts.	✓	
Editors can quickly and conveniently invite reviewers who have been suggested or opposed by the submitting author. Appropriate warnings appear during reviewer searching and selection.	✓	
Editors have convenient access to reviewer decline reasons as part of workflow.	✓	
Editors can "propose" reviewers for subsequent invitation by staff.	✓	
Editors can customize the reviewer invitation letter(s) "on-the-fly."	✓	
Editors can optionally re-open submitted reviews so that reviewers can correct or update previously submitted comments.	✓	
Editors can modify reviewer due date. Editors can specify the number of reviews required for a particular manuscript (if permitted by the editorial office).	✓	
Editors can easily identify manuscripts where reviewers have not yet responded to their invitation, as well as reviews in progress.	✓	
Editors can easily identify manuscripts which have all required reviews completed and which are ready for a decision.	✓	
Editors can select "alternate" reviewers who will be automatically invited if primary reviewers decline the reviewer invitation (configurable option). Alternate reviewers can be designated to replace specific reviewers.	✓	
Letters used to invite alternate reviewers can be pre-configured and edited by authorized editors.	✓	

Editors can easily sort lists of displayed manuscripts.	✓	
The number of manuscripts displayed per page is user-defined.	✓	
Editors can collapse and expand lists of manuscript records to facilitate viewing of long lists.	✓	
"Submit as an editor" functionality allows editors to quickly upload manuscripts intended for publication without peer review.	✓	
Editors can see customized "flags" that provide visual alerts associated with each manuscript (e.g. urgent manuscript, possible cover artwork, etc.).	✓	
Submission "flags" can be associated with specific metadata entries.	✓	
Editors can create and save searches for submissions with specific "flags."	✓	
Editors can be granted access to manuscript details (metadata) including notes added by the editorial office.	✓	
Editors can be granted access to reviewer "people" information including notes added by the editorial office.	✓	
Editors can be granted access to manuscript searching capabilities (e.g. searching by manuscript number, author name, keywords, notes etc.). Search results include "actions" so editors can perform appropriate tasks following retrieval of desired manuscript(s).	✓	
Editors can access manuscript and people search functionality from any page.	✓	
Editors can search people notes.	✓	
Editors can be granted access to reports and statistics.	✓	
Reports can be displayed in a graphical format such as graphs, charts and gauges.	✓	
Editors can easily modify and save standard reports.	✓	
Editors can use a web-based reporting tool that facilitates data selection, manipulation and presentation.	✓	
Reports can be emailed to editors according to a configurable schedule (e.g. weekly).	✓	
Editors can be granted access to the correspondence history, including the text of any standard and customized letters.	✓	
Editors can conveniently add externally received emails to the manuscript correspondence record.	✓	
Editors can be granted the power to assign a manuscript to other editor roles using multiple email letters that can be edited "on-the-fly."	✓	
Editors can conveniently reassign revised manuscripts to all the editors who handled the prior version of the manuscript.	✓	
Editors can make decisions concerning manuscripts at any time regardless of reviewer status.	✓	
The list of editor decision terms displayed is configured and controlled by the editorial office. Any number of decision terms can be configured and modified at any time using web-based administration tools.	✓	
Editors can select from multiple decision email letters for each decision term.	✓	
Editor decision letters can include attached files as a link or directly as an email attachment.	✓	
The editor decision page provides single-screen access to all the information needed by the editor to make a decision about the manuscript, including all manuscript revisions, all reviewer comments, comments from other editors, author letters, and prior decision letters.	✓	
Editors can save their comments for later submission.	✓	
Editors can display and print a complete layout of their comments prior to submission.	✓	
Editors can edit reviewer comments that will be displayed to the author (the original unedited version remains stored and available in the system).	✓	
Editors can enter confidential internal comments and comments for the author.	✓	
Editor comments and decision terms can be merged into standard author decision letters, and can be customized "on-the-fly."	✓	
All letters (including decision letters) can be CC'd or BCC'd to specific email addresses.	✓	
Draft decision letters can be shared between editors.	✓	
Editors can rate reviewer performance.	✓	
Editors can optionally allow "open peer review" where author and reviewer identities are visible.	✓	
Editors have the option to "terminate" or "uninvite" reviewers who have not submitted their review prior to decision. Appropriate warnings are displayed if reviewers have saved a partially completed review.	✓	
Editors can be given permission to send reminder letters to reviewers (configured by the editorial office).	✓	
Editors can customize Reviewer reminder letters "on-the-fly."	✓	
Editors can set up Automated Reminders to send to reviewers who have not responded or sent in their review.	✓	
Email letters sent by editors can include automatic calendar entries.	✓	

Editors can view completed reviewer forms. Reviewer forms can contain unlimited questions including text, numeric, date, yes/no, type responses. Reviewer forms are appropriate to submission article type and revision.	✓	
If an editor has assigned a manuscript to another editor(s), they can group those manuscripts by editor name.	✓	
Editors can be “unassigned” from a submission so that the submission can be “rolled back” to an earlier editor, or entirely switched to a new editor along with in-process reviews.	✓	
Editors can view manuscripts with their prior decisions, grouped by decision (accept, reject, withdrawn, transferred).	✓	
Editors can access key performance data when selecting reviewers, such as the average time to complete a review, number of times the reviewer has declined assignments, number of outstanding assignments and unavailable dates.	✓	
Appropriately authorized editors can “proxy” for authors and reviewers. System includes an audit trail of “proxied” transactions.	✓	
Appropriately authorized editors can upload and download submission and “companion” files from the manuscript file inventory folder.	✓	
Emails sent by the system can be configured to come “from” a default publication email address or the editor’s personal email address.	✓	
Editor can add production notes to an accepted manuscript.	✓	
Manuscript metadata and author source files can be automatically transmitted to a third party production tracking system (or print vendor) in XML format.	✓	
A publication-customized transmittal form displays all relevant metadata to be transmitted to production system upon final acceptance of a manuscript.	✓	
The editorial office can configure additional transmittal form fields.	✓	
Editors are alerted to potential duplicate submissions based on Author name(s), title matches and abstract matches. Duplicate submissions can be checked within a single journal or across multiple journals.	✓	
Editors can be prevented from seeing reviewer comments that pertain to manuscripts that they (the editor) have authored.	✓	
Editors can easily register and invite unregistered users to review a particular manuscript.	✓	
Upon resubmission, a revised manuscript can be (optionally) automatically assigned to the editor who handled it previously.	✓	
Appropriately authorized editors can run author reminder reports to identify authors who are late in submitting manuscript revisions. Reminder letters can be sent and customized “on-the-fly”.	✓	
Editors can allow “late” reviews to be added to the manuscript record.	✓	
Editors can release an accepted manuscript to an online journal site for pre-print publication (WebFirst).	✓	
Editors can initiate manuscript proposals and invite one or more authors to respond to the invitation.	✓	
Authors can be easily invited to submit a manuscript using configurable invitation letters that can be edited “on-the-fly”. Author invitation letters can include deep links so that authors can respond to the invitation without needing to log into the system.	✓	
Editors can invite authors to submit commentaries based on existing submissions.	✓	
Editors can select “alternate authors” who will be automatically invited to make a submission if earlier invited authors decline invitation.	✓	
Editors can track proposals and commentaries through submission and peer review workflow. Relevant submissions are “linked”. Linked submissions can share prior Reviewers.	✓	
Editors can view test results for author artwork checking against publication-defined requirements.	✓	
Editors can view a manuscript rating card that aggregates the reviewers’ responses to radio button questions on the reviewer form.	✓	
Editors can select specific reviewer question responses to include in decision letters.	✓	
Editors can download and edit reviewer attachments, and optionally display reviewer attachments to authors upon revision.	✓	
Editors can upload, download and edit submission attachments. Attachments can be optionally displayed to other workflow participants. “Deep links” provide a convenient way to access attachments directly from within email.	✓	
Editors can attach external or manuscript files to ad hoc email letters.	✓	
Editors can register their opinions using radio buttons on a customized editor form.	✓	
Editors can send formatted letters with images and logos using HTML.	✓	
Editors can edit and resend email letters.	✓	
Editors can be granted access to search a variety of third party bibliographic databases (such as PubMed, Google Scholar, etc.). Search queries can be configured to automatically use manuscript title, keywords or author names as the search criteria.	✓	
Editors can automatically deposit accepted manuscript into the PubMed NIHMS system (PMPT).	✓	
Editors have access to ad hoc emails sent to editorial staff that are automatically recorded in the system. Editorial offices can configure an unlimited number of editor ad hoc emails that include merge fields to automatically import useful data such as	✓	

manuscript number and title.	✓	
Editors can see author bibliographies that have been automatically linked to PubMed and CrossRef, and formatted to the publication's preferred bibliographic style.	✓	
The system automatically detects and corrects some errors in author submitted bibliographies. (For example: insufficient authors listed before "et al" or missing volume numbers).	✓	
Users can switch between reviewer, editor and author roles without having to log out of the system.	✓	
Editor role can be selected as the default log-in role for editor convenience.	✓	
For convenience, Editors can use their ORCID username and password as a single-sign-on (SSO) option to multiple journals.	✓	
Editors can send a thank you letter to reviewers following manuscript decision that includes publication-selected merge fields (such as the editor's comments to the author and the decision term). This functionality can be configured to exclude author names for publications running a "double blind" workflow.	✓	
Editors can trigger an automatic author name search to view a list of the author's prior publications.	✓	
At key points in the workflow, editors can select (and edit) from a list of appropriate publication-defined template email letters. For example, this means that reviewers can be sent different invitation letters based on article type or revision number.	✓	
Editors can receive periodic (e.g. daily, weekly) reminders of their "to do" list with convenient "deep links" to undertake actions.	✓	
Customized merge fields allow editors to automatically populate email letters with preferred text and graphics.	✓	
Editors can perform assigned tasks simply by clicking secure deep links sent to them by email, without having to log into the system.	✓	
Editors can choose to "save and submit later" in-process decisions and letters.	✓	
Email letters can be re-sent from the manuscript's correspondence history.	✓	
Email content can be in Unicode format.	✓	
Editors can view status history and correspondence history of submissions.	✓	
Editors can uninvite or terminate reviewers and subordinate editors.	✓	
Editors can be granted access to an assignment status report that clearly shows the peer review status for each manuscript that is active in the editorial workflow. From the report, editors can take appropriate actions such as inviting additional reviewers or sending email reminders.	✓	
Editors can be granted access to a reviewer performance report that shows detailed performance for each reviewer in the system. This data can be extracted for further manipulation in a desktop application such as Microsoft Excel.	✓	
Editors can submit author manuscripts to CrossCheck for plagiarism checking. (Additional charges apply).	✓	
Editors can conveniently view results of plagiarism (Crosscheck) checking without needing to wait for file upload.	✓	
Editors can be granted limited access to system configuration options.	✓	
Editors can view author responses to publication-defined submission questions configured by article type and revision.	✓	
Submissions can be "linked" during workflow to ensure that they are edited, reviewed and published together. Submissions designated for joint publication can be linked with a unique group ID.	✓	
Letter-to-the-editor functionality facilitates processing of multiple submitted letters and trafficking of comments to authors, reviewers and production.	✓	
A system-generated unique DOI (Digital Object Identifier) can be assigned to the submission during workflow.	✓	
Editors can convene a "discussion forum" (chat room) to discuss a particular submission with other editors and permit shared access to relevant submission components.	✓	
Editors can transfer or offer transfer of submissions between co-operating publications. Authors can confirm transfer option thereby initiating automatic transfer of files and data to recipient journal.	✓	
Editors can grant author access to submission correspondence history from the author home page.	✓	
Authors can process publication fees (submission fees, page charges, color charges, open access fees, etc.) during manuscript workflow. Authors can pay by credit card, "bill me" or waiver request, as determined by publisher.	✓	
Journal office can collect fees from authors, including submission fees, color charges, open access fees, page charges, etc. Fees can be collected by credit card, bill me or waiver request option.	✓	
Editor home page can include "quick links" to editor's preferred list of actionable submissions. Quick links can be shared with other authorized users.	✓	
Authorized editors can independently edit manuscript metadata and/or submitted files.	✓	
When inviting authors to submit manuscripts, editors can easily view past invitation statistics and can add invitee specific notes.	✓	
Editors working on multiple journals can use one click to automatically log-in to other authorized journals.	✓	
When searching for reviewers, editors have visibility into reviewer activity on other co-operating journals.	✓	

Automatic linking to database of 2,500,000 author biographical profiles.	✓	
Editors are alerted to time zone differences.	✓	
Editors can CC emails received outside of the system to a peer review "inbox" that will automatically file the email with the correct manuscript "history."	✓	
Editors can recommend transfer of a manuscript to a third-party journal and permit the author to authorize the transfer during configurable "transfer window."	✓	
Editors can view reviewer authorization to transfer their review and identity with transferred manuscript.	✓	
Editors can direct authors and co-authors to a publication-customized web form to complete multi-part questions. This can be used to obtain compliance with ICMJE and similar forms for each individual author.	✓	
Editors can manage the author/co-author form process to check for completeness and compliance, including automatic reminders.	✓	
Editors can configure and associate hundreds of graphical "flags" to display next to people names.	✓	
Editors have access to FundRef funder information for the manuscript.	✓	
Editors have access to normalized Author institution names (Ringgold data).	✓	



Editorial Office Functionality Checklist

The checklist is current for Version 12.0.

If you have a requirement that you do not see on the list
or if you have questions, please send an email to marketing@edmgr.com

Editorial office can display system login box on any web page, such as the journal online site.	✓	
For convenience, Editorial office staff can use their ORCID username and password for single-sign-on (SSO) across multiple journals.	✓	
Editorial office uses web-based administration tools to control user roles and permissions.	✓	
Journal office can select security rules for log-in and user record editing based on publisher policy.	✓	
Editorial office uses web-based tools to set up template letters with appropriate merge fields.	✓	
Appropriate letters can also be edited "on-the-fly."	✓	
Editorial office can "trigger" letters by associating template letters with specific system events.	✓	
Editorial office can configure dozens of graphical "flags" to display next to the manuscript which indicate action items and idiosyncrasies at-a-glance.	✓	
Submission "flags" can be associated with specific metadata entries.	✓	
Editorial office can see "Search Submissions – Results" in a modern, streamlined, interactive grid.	✓	
Editors can create and save searches for submissions with specific "flags."	✓	
Editorial office can receive new manuscript submissions from authors, or manuscripts can be automatically assigned to editors based on journal section or editorial role.	✓	
Editorial office can "bounce" submissions back to authors for resubmission (for clean-up, missing materials, etc.).	✓	
Editorial office can edit submissions prior to assignment to an editor, or "bouncing" them back to the author.	✓	
Editorial office can remove spurious or test submissions and no submission charge is made for such removed submissions.	✓	
Editorial office can easily "proxy" transactions on behalf of authors, reviewers, and editors.	✓	
Authors can be required to explicitly agree to configurable editorial office policies and terms via an "I accept" checkbox.	✓	
Editorial office can easily register new users. Editorial office has tools to identify and merge duplicate user records.	✓	
When assigning manuscripts to editors, the editorial office can see information about the editor's availability and current assignments.	✓	
Editorial office can configure submission steps to capture author recommended and/or opposed reviewers.	✓	
Editorial office can prevent an editor from having access to a submission, if that editor was a contributing author for that submission.	✓	
Editorial office can configure author submission questions that include radio buttons, drop-down lists, dates, free text, check boxes, etc. Questions can be mandatory for new or revised manuscripts and can be limited by word count or character count. Questionnaires are configurable by article type. Two author questionnaires can be used during the workflow of a manuscript: one containing submission-related questions and one containing author- and co-author-related questions.	✓	
Editorial Office can associate metadata identifiers with data elements, such as custom questions, to facilitate smooth transfer of manuscript data between journals.	✓	
New manuscripts can be sent to editors by assignment or invitation.	✓	
Editorial office can select from a variety of manuscript numbering options (automatic or manual).	✓	
Manuscript numbers reflect revision status (e.g. R1, R2, etc.).	✓	
Manuscript numbers can be assigned at new submission, or at time of first editor assignment.	✓	
Revised manuscripts are clearly identified in the system, and can follow different workflows.	✓	

Editorial office can configure which user registration fields are mandatory or optional. Users can be forced to respond to new questions upon login.	✓	
Editorial office can prompt users to register with multiple email addresses to minimize the chances of spam blocking.	✓	
Email content can be in Unicode format.	✓	
Editorial office can configure the terms used to describe the manuscript status.	✓	
Editorial office can configure manuscript status terms seen by author to be different to internal status descriptors.	✓	
Editorial office can use web-based administration tools to configure their own article types and specify workflow parameters based on article type.	✓	
Editorial office can configure article types that are only used internally by editors for expedited submission and processing without peer review.	✓	
Editorial office can configure the system to capture personal identifiers such as ORCID, ISNI, PubMed Author ID, Researcher ID, and Scopus Author ID.	✓	
Personal identifiers such as ORCID can be required or optional; and can be solicited from authors, co-authors, reviewers and editors.	✓	
Editorial office can manage and “fetch” ORCIDs for users.	✓	
Editorial office can tighten ORCID requirements for specific article types through configuration.	✓	
Editorial office can determine what submission items (e.g. images, tables, supplementary item, video, etc.) can be uploaded by the user for each article type.	✓	
Editorial office can determine that some items (e.g. data sets, videos, etc.) are submitted as URL/URIs pointing to files on external systems such as Dryad or FigShare.	✓	
Editorial office can configure uploaded compressed (ZIP) files to be automatically unpacked, or to remain compressed.	✓	
Editorial office can configure their own classification (keyword) terms used to identify manuscripts and reviewer expertise. Keywords can be organized into an unlimited number of levels and ordered by number or alphabetically.	✓	
Editorial office can permit authors and reviewers to enter free-form keywords.	✓	
Editorial office can activate Reviewer Discovery, enabling editors to search and select candidate reviewers from an external database of 3.5 million scholar profiles, including biographical information and publication history.	✓	
Editorial office can configure reviewer form questions that include radio buttons, drop-down lists, dates, free text, check boxes, etc. Questions can be mandatory for new or revised manuscripts and can be limited by word count or character count. Questionnaires are configurable by article type and reviewer role.	✓	
Editorial office can configure multi-part web forms for completion by the corresponding author and by individual co-authors (e.g. ICMJE form).	✓	
Editorial office can manage form completion process and can delegate visibility to Corresponding Author to chase co-authors.	✓	
Editorial office can configure automatic author and co-author form completion reminders.	✓	
Editorial office can configure the system with its own reviewer and editor decision terms.	✓	
Editorial office can configure multiple email letter options for each decision term.	✓	
Editorial office can configure customized fields for manuscripts (including text, numeric, date, or drop-down lists).	✓	
Editorial office can configure customized fields for user records (including text, numeric, date, or drop-down lists).	✓	
Editorial office can configure submission metadata (e.g. abstract, title, short title, etc.) to be limited by number of characters or words.	✓	
Emails sent by the system are from a publication-configured email address or from a designated “corresponding editor” email address.	✓	
Editorial office can configure its preferred date and time format.	✓	
Editorial office can determine which submission steps are shown to authors during the submission process. Different submission steps can be defined for a new or revised manuscript per article type.	✓	
Editorial office can check on the status of manuscripts assigned to editors.	✓	
Editorial office can produce and send customized reviewer reminder email letters. Email letters can be customized “on-the-fly.”	✓	
Editorial office can configure an unlimited number of automated reminders that will automatically be emailed to reviewers X days prior or after invitation/acceptance of review task.	✓	
Editorial office can configure outbound emails to include automatic calendar updates (iCal) for enhanced deadline management.	✓	
Editorial office can configure email letters to include automatic CC and BCC.	✓	
Editorial office has the option to edit email letters before resending them.	✓	
Editorial office can group manuscripts by the editor who is currently responsible for the manuscript.	✓	

System can be configured such that the editorial office sends out final editor decision letter.	✓	
Editorial office can configure default manuscript settings by article type, such as the number of required reviews, time allowed for reviewer invitation acceptance, and time allowed for reviewer recommendation.	✓	
Editorial office has low-level access to database tables to perform searches and extract data in a standard format.	✓	
Editorial office staff can be granted access to reports and statistics.	✓	
Reports can be displayed in graphical format such as graphs, charts and gauges.	✓	
Editorial office can easily modify and save standard reports.	✓	
Editorial office can use a Web-based reporting tool that facilitates data selection, manipulation and presentation.	✓	
Reports can be emailed to Editorial office staff and editors according to a configurable schedule (e.g. weekly).	✓	
Editorial office can create custom reporting groups of journals such as "OA Journals" or "North American Journals."	✓	
Editorial office reporting based on journal groupings can be shared with certain editors.	✓	
Editorial office has access to standard reports such as the Journal Accountability Report that includes Journal Turnaround Time, Reviewer Statistics, Decision Summary, and Correspondence History (please contact us for a full list of reports).	✓	
Editorial office staff can invite reviewers that have been "proposed" by editors. Editorial office can configure which editors can propose and/or invite reviewers.	✓	
Editorial office can identify "alternate reviewers" who will be automatically invited to submit a review if specific designated reviewers decline their invitation.	✓	
Editorial office is able to search and edit "people" information, including the ability to add people-specific notes to people records, and URLs pointing to external resources.	✓	
Editorial office can download people search results.	✓	
Editorial office can configure hundreds of graphical "flags" to associate information with people records.	✓	
Editorial office can search people "flags."	✓	
Editorial office can search manuscript notes.	✓	
Editorial office can customize and send batch emails to registered users.	✓	
Editorial office can view a full audit trail of status changes and correspondence history for any manuscript.	✓	
Editorial office can initiate author rebuttals, even after a final decision has been made.	✓	
Editorial office can append or make corrections to reviewer comments following decision.	✓	
For journals operating with large numbers of Editors, the system can be configured to suggest and manage Editor assignment in an automated manner.	✓	
Editorial office can undo erroneous Editor assignments. In-process submissions can be "rolled back" to prior Editors or switched to alternative editors.	✓	
Editorial office can organize accepted articles into issues and tables-of-contents.	✓	
Editorial office can create customized "transmittal form" emails that are triggered upon acceptance of a manuscript.	✓	
Editorial office can configure which content, metadata, and author source files are transmitted to the production tracking system or printer following final acceptance of a manuscript.	✓	
Manuscript transmittal can be undertaken in a variety of XML formats including JATS version 1.1A , and supports inclusion of FundRef data.	✓	
Editorial office can customize which manuscript data, including submission questions and author responses, appears on the PDF version of the manuscript cover page. Different article types can have different cover pages at submission and revision.	✓	
Editorial office can permit authors to view individual reviewer responses to reviewer form questions.	✓	
Editorial office can configure HTML text to appear on system-generated PDFs that include links and formatting.	✓	
Editorial office can attach searchable manuscript-specific notes to submission records.	✓	
Editorial office can configure an unlimited number of editor reminder reports that contain a "to do" list for editors summarizing all the editor's outstanding actions.	✓	
Editorial office can generate reports detailing outstanding author revisions and configure an unlimited number of author reminders that will be sent by the system prior or following author due dates.	✓	
Editorial office can customize the instructions displayed for authors when they first register on the system.	✓	
Editorial office can post a customized message on the author home page.	✓	
Editorial office can view the results of artwork quality testing for image files uploaded by authors. Artwork testing results can be incorporated into email letters using merge fields.	✓	

Editorial office can create proposals and assign them to editors for author invitation.	✓	
Editorial office can select “alternate authors” who will be automatically invited to make a submission if earlier invited authors decline invitation.	✓	
Editorial office can run reports and send reminders to authors with respect to invited submissions.	✓	
Editorial office can configure colors to be associated with each submission item type, thereby facilitating file management.	✓	
Editorial office can configure the collection of metadata associated with each author submission item. For example, figure legend, number, type or permissions could be captured.	✓	
Editorial office can configure the short title field to be required or optional for author submission.	✓	
When assigning a manuscript to an editor, the editorial office can see the editor’s current assignments and subject matter expertise.	✓	
Editorial office can test and correct users’ country registration information against the ISO 3166 country standard.	✓	
Editorial office can configure different reviewer forms and instructions based on article type and reviewer role.	✓	
Editorial office can configure different editor forms and instructions based on article type and editor role.	✓	
Editorial office can optionally allow the upload of attachments by reviewers and editors.	✓	
Editorial office can add a “late” review even if it is submitted after the review process has been closed.	✓	
Manuscripts can be organized into customized “Region” lists (e.g. Europe) in addition to country designation.	✓	
Editorial office can designate that selected email letters are sent in HTML rather than plain text format so that they display images, formatting and branding.	✓	
Editorial office can configure unlimited links to third party bibliographic databases (such as PubMed, Google Scholar, etc.). Search queries can be configured to automatically use manuscript title, keywords or author names as the search criteria.	✓	
Editorial office can configure an unlimited number of ad hoc emails to be sent by authors, reviewers and editors. Ad hoc emails are automatically recorded in the system and can be configured to include merge fields that automatically import useful data such as manuscript number and title.	✓	
Editorial office can limit the ad hoc editor letters available to specific editor roles.	✓	
Editorial office can configure the system so that author-submitted bibliographies are automatically linked to PubMed and CrossRef, and formatted to the publication’s preferred bibliographic style. Automatic linking and formatting can be configured to occur on initial submission, revised submission, and/or final decision.	✓	
The system automatically detects and corrects some errors in Author submitted bibliographies. (For example: insufficient authors listed before “et al” or missing volume numbers).	✓	
Editorial office can configure user roles to permit switching between roles and default role selection for login convenience.	✓	
Editorial office staff can collapse and expand lists of manuscript records to facilitate viewing of long lists.	✓	
Editorial office can configure line numbering overlay on author submitted items by uploaded item type.	✓	
Editorial office can configure a “technical check” workflow to ensure a manuscript meets minimum technical criteria before assignment to a content editor.	✓	
Editorial office can configure a reviewer thank you letter to be available following manuscript decision that includes publication-selected merge fields (such as the editor’s comments to the author and the decision term). This functionality can be configured to exclude author names for publications running a “double blind” workflow.	✓	
Editorial office can group template letters into “letter families.” At key points in the workflow, editors can select (and edit) from a list of appropriate publication-defined template email letters. For example, editors can select from a list of reviewer invitation letters based on article type or revision number.	✓	
Editorial office can configure secure editor deep links so that editors can perform assigned tasks simply by clicking links sent to them by email, without having to log into the system. This means the system is very easy and convenient to use, even for editors who participate infrequently.	✓	
Editorial office can conveniently re-send emails from the manuscript’s correspondence history.	✓	
Editorial office can conveniently add externally received emails to the manuscript correspondence record.	✓	
Editorial office can control the editor’s reviewer search experience with customized instructional text and limited search options and criteria.	✓	
Editorial office can use the assignment status report to take appropriate actions such as inviting additional reviewers or sending email reminders.	✓	
Editorial office can use the reviewer performance report to generate detailed performance information for each reviewer in the system. This data can be extracted for further manipulation in a desktop application such as Microsoft Excel.	✓	
Editorial office can configure the text that appears on the login and registration pages; and can upload a publication thumbnail graphic to appear on the login page. These changes can be made by the editorial office at any time without the cost or inconvenience of a software change request.	✓	

Editorial office can configure options for submission of author manuscripts to CrossCheck for plagiarism checking. (Additional charges may be applied).	✓	
Editorial office can configure automatic upload of submissions for plagiarism (CrossCheck) checking based on workflow events (e.g. new submission, final acceptance, revised submission).	✓	
Editorial office can configure display of CrossCheck results to Authors and Reviewers.	✓	
Editorial office can grant editors limited access to system configuration options (e.g. just the ability to edit template email letters).	✓	
Editorial office can limit or hide letter templates for editors and reviewers.	✓	
Editorial office staff can “link” submissions during workflow to ensure that they are edited, reviewed and published together. Submissions designated for joint publication can be linked with a unique group ID.	✓	
In the case of linked submissions, the Editorial office can permit sharing of reviewer comments between linked submissions during editorial workflow.	✓	
Editorial office staff can configure letter-to-the-editor functionality to facilitate processing of multiple submitted letters and trafficking of comments to authors, reviewers and production.	✓	
Editorial office can configure the system to generate a unique DOI (Digital Object Identifier) for a submission during workflow.	✓	
Editorial office can convene a “discussion forum” (chat room) to discuss a particular submission with other editors and permit shared access to relevant submission components.	✓	
Editorial office can configure multiple discussion forum templates with default settings and text.	✓	
Editorial office can configure discussion forum templates that are triggered automatically.	✓	
Editorial office can transfer submissions between co-operating Editorial Manager and non-Editorial Manager publications.	✓	
Editorial office can grant author access to submission correspondence history from the author home page.	✓	
Editorial office can require acknowledgement from contributing authors (named by the corresponding author), either by requiring that they click on an emailed “deep link”, or by requiring that contributing authors create/validate a user record in the system.	✓	
Editor home page can include “quick links” to editor’s preferred list of actionable submissions. Quick links can be shared with other authorized users.	✓	
Authorized editorial office staff can independently edit manuscript metadata and or submitted files.	✓	
Editorial office staff can configure metadata fields for association with specific article types.	✓	
When searching for reviewers, editors have visibility to reviewer activity on other co-operating journals.	✓	
Editorial office staff working on multiple journals can use one click to automatically log-in to other authorized journals.	✓	
Editorial office is alerted to time zone differences.	✓	
System includes eCommerce and comprehensive author charging functionality (see Commerce Manager).	✓	
Editorial office can configure the “Manuscript Services” icon to display to authors during submission workflow.	✓	
Editorial office can work with third party manuscript service providers (MSPs) like Editage® via EM Ingest, allowing automation of the manual manuscript submission workflows MSPs already employ.	✓	
Editorial office can choose to deactivate a MSP they opt not to work with.	✓	
Editorial office can forward emails received outside of the system to a peer review “inbox” that will automatically file the email with the correct manuscript “history.”	✓	
Editorial office can be alerted to potential duplicate submissions based on Author(s) name(s), manuscript title and manuscript abstract, either within the journal or across publisher journals.	✓	
Editorial office can activate FundRef submission option so that Authors and Co-Authors can provide accurate funding information using the FundRef list of standardized research funders and sub-agencies.	✓	
Editorial office can leverage standardized institutional name identification using the Ringgold institutional database.	✓	
Editorial office can configure “Open Peer Review” workflows where Author and Reviewer identities are revealed and Reviewer comments are exported for publication.	✓	
Editorial office can use external Open Access fee payment systems (such as RightsLink from CCC) to notify and collect APCs (Article Publications Charges) from Authors either in full OA or hybrid publication models.	✓	
Editorial office can configure an unlimited number of custom merge fields so as to include standard information and graphics in email letters sent by the system.	✓	
Editorial office can trigger an export of information to PRE for evaluation.	✓	



Reviewer Functionality Checklist

The checklist is current for Version 12.0.

If you have a requirement that you do not see on the list
or if you have questions, please send an email to marketing@edmgr.com

Users can register themselves on the system and indicate their willingness to be reviewers, or can be registered by an editor.	✓	
Reviewers can be formally identified using ORCID and other identifiers (such as ISNI, Researcher ID, Scopus ID and PubMed ID). Reviewers can easily look up ("fetch") their ORCID.	✓	
Reviewers can use their ORCID username and password as a Single Sign On (SSO) option between different journals.	✓	
Reviewers can be categorized by publication-defined multi-level keywords (areas of expertise).	✓	
Reviewers can enter their own keywords to define their area of expertise.	✓	
Reviewers can identify their institutional affiliation from a standardized (Ringgold) list of institutional names. Institutional names auto-complete as the Reviewer types.	✓	
Editorial office can invite reviewers to review a manuscript by email (See Editor Checklist for more details).	✓	
The amount of information displayed to the reviewer (e.g. abstract) before accepting the invitation is controlled by the editorial office.	✓	
Reviewers can accept or decline a reviewer invitation.	✓	
The system can be set up as "single-blind" or "double-blind".	✓	
For journals using Open Peer Review workflows, reviewer identifying information can be shared with Authors and other Reviewers.	✓	
Reviewers can submit their review online.	✓	
Reviewers can save their review for later submission.	✓	
Reviewers can request, and journals can optionally re-open submitted reviews for further editing.	✓	
Reviewers can select from a publication-defined list of recommendation terms.	✓	
Reviewers can rate the manuscript.	✓	
Reviewers can be presented with a publication-defined reviewer form.	✓	
Reviewers can proof and print their entire review before submission to the editorial office.	✓	
Reviewers can view their previously completed assignments.	✓	
Reviewer does not have to download multiple PDFs for each item comprising a submission. Instead, the reviewer has the convenience of downloading a single PDF.	✓	
When reviewing a revised manuscript, reviewers have access to prior revisions of the author's manuscript.	✓	
Reviewers can be prompted to suggest alternate candidate reviewers if they decline an assignment.	✓	
Editorial offices can define multiple reviewer roles (e.g. Regular reviewers and Biostatistical reviewers) with different workflow parameters.	✓	
Editors can be granted access to detailed reviewer statistics when selecting reviewers.	✓	
Editors can send a request to the editorial office to assign an unregistered reviewer or can directly register and invite a new reviewer.	✓	
Reviewers can agree to transfer their identity and reviewer comments if a rejected manuscript is transferred to another publication.	✓	
Due dates and deadlines are visible to reviewers on-screen and in email communications.	✓	
Reviewer reminder letters can be sent to reviewers before a review is due and/or when a review is late. All reviewer letters can be customized "on-the-fly" by the editorial office.	✓	

A reviewer's performance statistics are displayed to the reviewer for each submission he or she reviewed, allowing the reviewer to see how they performed over time.	✓	
Emails to reviewers can include electronic calendar entries (using the iCalendar file format standard) so that reviewer due dates can be easily tracked in their electronic calendar.	✓	
Reviewers can view the author's response to their review, which is recorded by the system.	✓	
Reviewers can indicate dates when they are not available.	✓	
Reviewers can respond to form questions that include radio buttons, drop-down lists, dates, free text, check boxes, etc. Questions can be mandatory for new or revised manuscripts and can be limited by word count or character count. Questionnaires are configurable by article type.	✓	
Reviewers see customized instructions based on article type and reviewer role.	✓	
Reviewers can upload attachments with their recommendations.	✓	
Reviewers can be granted access to attachments uploaded by authors, reviewers and editors.	✓	
Reviewer's uploaded Word and PDF file properties are automatically sanitized to ensure reviewer anonymity.	✓	
Reviewers can respond to reviewer assignments without needing to explicitly log into the system, by clicking on secure links embedded in emails sent to them by the publication.	✓	
Reviewers who login through deep links can be exempted from normal registration questions, in order to expedite their login.	✓	
Reviewers see registration and login instructions that have been customized by the editorial office.	✓	
Reviewers can be granted access to search a variety of third-party bibliographic databases (such as PubMed, Google Scholar etc). Search queries can be configured to automatically use manuscript title, keywords or author names as the search criteria.	✓	
Reviewers have access to ad hoc emails sent to editorial staff and are automatically recorded in the system. Editorial offices can configure an unlimited number of reviewer ad hoc emails that include merge fields to automatically import useful data such manuscript number and title.	✓	
Reviewers can see author bibliographies that have been automatically linked to PubMed and CrossRef, and formatted to the publication's preferred style.	✓	
Users can switch between reviewer, editor and author roles without having to log out of the system.	✓	
Reviewer role can be selected as the default login role.	✓	
Reviewer can receive an editor decision letter separate from the decision letter sent to the author, and author identifying information can be removed for "double-blind" workflows.	✓	
Reviewers can be configured to receive a thank you letter following the editor decision that includes publication-selected merge fields (such as the editor's comments to the author and the decision term). This functionality can be configured to exclude author names for publications running a "double blind" workflow.	✓	
Reviewers are alerted to time zone differences.	✓	
Reviewers working on linked submissions can be given access to prior reviews on linked submissions.	✓	
Reviewers can be given access to their past performance statistics.	✓	
Reviewers can be given access to the similarity check (CrossCheck) results for the author's manuscript.	✓	
Reviewers can check on review invitations and open reviews across multiple journals using EM mobile WebApp.	✓	